



## November 2022 Monthly Exit Survey Results Commentary

The Exit Survey is an important tool that tracks visitor performance and contributes to Visit Jersey's analysis of how the visitor economy is recovering. Due to Covid, the Exit Survey did not run from April 2020 to the end of 2021, but we were able to monitor performance through the Government of Jersey's travel registration forms.

### November summary

#### November 2022 compared to November 2021

- Total visits have increased by 16% in November 2022 compared to November 2021.
- Total holiday visits in November 2022 decreased by 24% compared to November 2021, VRF increased by 66%, business by 42% and 'other' doubled (98%).

#### November 2022 compared to November 2019

- There was a total of 47,250 **departing passengers**<sup>1</sup> from Jersey, reflecting a recovery to around three-quarters (73%) of 2019 levels.
- Of all departing passengers, 47% were **tourism visitors**<sup>2</sup> who had reached the end of their stay in Jersey (22,320).
- The **total number of tourism visits** recovered to two-thirds (66%) of 2019 levels.
- A total of 19,720 visitors stayed in Jersey for at least one night and together they spent a total of 77,570 nights on the Island.
- Whilst the number of overnight visitors remains at less than three-quarters of 2019 levels (68% recovery in November 2022), the number of visitor nights has recovered to 87% of previous levels, due to the increased average length of stay.
- The number of holiday day visits was 940, reflecting a recovery to a third (33%) of the level seen in 2019.
- The **average length of stay** was 3.9 nights (for those visitors staying for at least one

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<sup>1</sup> Departing passengers include residents travelling off-Island, visitors leaving at the end of their visit, visitors who are already in Jersey but who go on a day or longer trip off-Island during their stay, as well as some transit passengers on certain routes.

<sup>2</sup> Tourism visits include any non-resident visitors to Jersey who may have stayed in Jersey for up to a year. Those visiting for leisure, business, study, sport or visiting friends or family are all classified as tourism visits, but seasonal or longer-term workers are excluded.

night), which is higher than in 2019 (3.1 nights) and the average recorded for 2017 to 2019 (3.5).

- Breaking the visitor numbers down by main **purpose of visit**:
    - **holiday** visits accounted for 34% of all visits at 7,520
    - **business** visits accounted for 30% of visits at 6,610
    - **visits to friends and family** accounted for 29% of visits at 6,420
  - The total number of holiday visits (7,520) recovered to 43% of levels seen in November 2019; the number of visitor nights has recovered to around half (53%) for this visitor type.
  - In November 2022, total number of business visitors was similar to 2019 (-4%); in comparison, the number of nights spent in Jersey by business visitors increased by 70% compared to same period of 2019. This is similar to the three year average recorded for 2017 to 2019 (-1%).
  - The number of visits to see friends and relatives recovered to 89% of previous levels and the number of nights spent on the island by this visitor type was seen to increase by 11%.
  - Breaking the visitor numbers down by **travel method**:
    - 86% of visitors travelled via **scheduled air** routes (19,260), recovering to 68% of 2019 levels
    - 12% of visitors travelled via **scheduled ferry** services (2,640), recovering to 53% of 2019 levels; whilst the number of visits made via scheduled ferry is significantly lower than in 2019, the number of visitor nights is up by over a quarter (29%)
  - Breaking visitor numbers down by **country of residence**:
    - 76% of visitors were from the **UK** (17,010)
    - 10% of visitors were from the other Channel Islands (2,320)
    - 8% of visitors were from **France** (1,870)
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## Year-to-date summary

### January – November 2022 compared to January - November 2021

Comparing these 11 months of 2022 to the same period during 2021:

- there has been almost double the volume of total visits, reflecting an increase of 93%.
- looking at each of the visit purpose categories individually, visits for business and 'other' purposes have each increased by over 100%. Holiday visits are up by 89% reflecting a promising start to the post-covid recovery of the tourism industry. Visits to friends and relatives increased by 79%.

### January – November 2022 compared to January – November 2019

- The total number of **departing passengers (808,020)** has recovered to 72% of 2019 levels.
- The number of **departing visitors (454,310)** has recovered to 61% of 2019 levels.
- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.3 nights in 2019 to 4.9 nights in 2022 resulting in the total number of visitor nights recovering to 79% of previous levels.
- The **UK and German markets** have shown a strong recovery in 2022, with the number of visits from these countries returning to around three-quarters of that seen in 2019 (73% and 76% respectively).
- In 2022, visits from the other **Channel Islands and France** have shown the slowest recovery at 48% and 29% of 2019 levels respectively.
- Although a smaller proportion of the overall visitor total, the **Irish market** has shown the strongest recovery in 2022, with visitor numbers returning to 90% of previous levels.

**Table A1: November 2017 to 2022**

November		<u>2017</u>		<u>2018</u>		<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 22/21</u>	
Total passengers		61,310		64,110		64,780		40,200		47,250		-27%		18%	
Total visits		27,440		37,260		33,650		19,260		22,320		-34%		16%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	
Topline	Overnight visits	24,550	96,900	35,130	120,770	28,890	89,300	18,410		19,720	77,570	-32%	-13%	7%	
	Day visits	2,890		2,120		4,760		850		2,610		-45%		207%	
		<u>3-year average 2017 to 2019</u>				<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 22/21</u>	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	
Purpose of visit	<b>Total Holiday visits</b>	<b>15,170</b>		<b>17,650</b>		<b>9,830</b>		<b>7,520</b>		<b>-57%</b>		<b>-24%</b>			
	- Overnight visits	13,870	45,590	14,820	47,910	9,500	6,580	25,230	-56%	-47%	-31%				
	- Day visits	1,300		2,830		330	940		-67%		185%				
	<b>Total Business visits</b>	<b>7,600</b>		<b>6,870</b>		<b>4,670</b>		<b>6,610</b>		<b>-4%</b>		<b>42%</b>			
	- Overnight visits	5,980	17,880	5,590	10,460	4,200	5,560	17,750	0%	70%	32%				
	- Day visits	1,620		1,280		470	1,050		-18%		123%				
	<b>Total VFR visits</b>	<b>7,080</b>		<b>7,220</b>		<b>3,860</b>		<b>6,420</b>		<b>-11%</b>		<b>66%</b>			
	- Overnight visits	6,940	32,220	6,940	27,520	3,830	6,350	30,450	-8%	11%	66%				
	- Day visits	140		280		30	70		-77%		117%				
	<b>Total Other visits</b>	<b>2,940</b>		<b>1,920</b>		<b>900</b>		<b>1,780</b>		<b>-7%</b>		<b>98%</b>			
- Overnight visits	2,740	6,640	1,550	3,410	880	1,230	4,140	-21%	22%	39%					
- Day visits	200		370		20	560		50%		2675%					
Country of residence	UK	23,710	78,060	23,640	71,970		17,010	58,440	-28%	-19%					
	Other CI	4,020	6,220	4,240	6,670		2,320	3,540	-45%	-47%					
	Ireland	320	1,670	110	710		170	880	56%	25%					
	France	3,310	5,410	4,400	6,130		1,870	5,850	-57%	-5%					
	Germany	100	2,920	10	20		120	540	1110%	3088%					
	Other	1,320	8,050	1,250	3,810		830	8,310	-34%	-100%					
Mode of departure	Scheduled air	28,200	89,590	28,260	80,510		19,260	66,270	-32%	-18%					
	Scheduled ferry	4,130	12,070	5,020	8,350		2,640	10,770	-47%	29%					
	Private plane	350	350	320	320		300	300	-7%	-7%					
	Visiting yachtsmen	100	320	40	120		120	230	182%	90%					
	Cruise passengers	0	0	0	0		0	0	0%	0%					
Duration of stay	Day visits	3,250		4,760			2,610	0	-45%						
	1-3 nights	20,240	41,710	20,920	44,370		13,170	27,920	-37%	-37%					
	4 - 6 nights	6,200	26,720	5,380	23,570		4,190	19,310	-22%	-18%					
	7 nights	1,600	11,090	1,830	12,770		1,030	7,230	-43%	-43%					
	8+ nights	1,480	22,810	760	8,590		1,330	23,100	74%	169%					

**Table A2: Cumulative - January to November 2017 to 2022**

Year-to-date		2017		2018		2019		2021		2022		Change 22/19		Change 22/21	
Total passengers		1,092,210		1,112,460		1,124,360		374,790		808,020		-28%		116%	
Total visits		678,840		690,760		739,430		235,480		454,310		-39%		93%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	582,600	2,769,560	587,790	2,609,190	616,920	2,641,520	227,660		424,320	2,088,000	-31%	-21%	86%	
	Day visits	96,240		102,980		122,510		7,820		29,990		-76%		284%	
		<b>3-year average 2017 to 2019</b>				<b>2019</b>		<b>2021</b>		<b>2022</b>		<b>Change 22/19</b>		<b>Change 22/21</b>	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Purpose of visit	<b>Total Holiday visits</b>	<b>482,470</b>		<b>501,980</b>		<b>147,060</b>		<b>277,760</b>		<b>-45%</b>		<b>89%</b>			
	- Overnight visits	413,090	1,880,170	427,640	1,886,470	142,200		258,840	1,308,750	-39%	-31%	82%			
	- Day visits	69,380		74,350		4,860		18,920		-75%		289%			
	<b>Total Business visits</b>	<b>68,080</b>		<b>61,310</b>		<b>20,930</b>		<b>49,850</b>		<b>-19%</b>		<b>138%</b>			
	- Overnight visits	52,000	177,670	46,120	122,550	18,860		43,490	137,340	-6%	12%	131%			
	- Day visits	16,080		15,190		2,070		6,370		-58%		208%			
	<b>Total VFR visits</b>	<b>97,470</b>		<b>103,330</b>		<b>55,890</b>		<b>99,820</b>		<b>-3%</b>		<b>79%</b>			
	- Overnight visits	96,020	494,870	101,280	504,630	55,400		98,950	567,480	-2%	12%	79%			
	- Day visits	1,440		2,050		490		860		-58%		76%			
	<b>Total Other visits</b>	<b>54,990</b>		<b>72,810</b>		<b>11,600</b>		<b>26,890</b>		<b>-63%</b>		<b>132%</b>			
- Overnight visits	34,650	120,570	41,880	127,870	11,200		23,030	74,400	-45%	-42%	106%				
- Day visits	20,330		30,920		400		3,860		-88%		865%				
Country of residence	JK	450,990	2,059,470	472,190	2,076,270			343,130	1,658,150	-27%	-20%				
	Other CI	47,680	76,090	55,740	87,500			26,770	56,930	-52%	-35%				
	Ireland	8,830	47,600	8,140	45,320			7,300	42,220	-10%	-7%				
	France	124,250	153,340	131,280	129,210			38,270	97,800	-71%	-24%				
	Germany	19,930	103,450	20,930	95,690			15,830	75,520	-24%	-21%				
	Other	51,330	233,470	51,150	207,530			23,010	157,350	-55%	-24%				
Mode of departure	Scheduled air	480,170	2,123,890	508,760	2,162,980			339,990	1,607,100	-33%	-26%				
	Scheduled ferry	196,580	504,460	203,370	430,110			96,910	454,840	-52%	6%				
	Private plane	4,290	4,290	5,150	5,150			5,190	5,190	1%	1%				
	Visiting yachtsmen	18,160	40,770	18,520	43,260			10,190	20,860	-45%	-52%				
	Cruise passengers	3,800	0	3,630	0			2,030	0	-44%	0%				
Duration of stay	Day visits	107,240				122,510				29,990		-76%			
	1-3 nights	268,480	599,590	292,270	656,990			178,150	399,730	-39%	-39%				
	4-6 nights	182,860	825,030	182,440	826,270			131,830	611,240	-28%	-26%				
	7 nights	101,290	694,310	104,260	717,020			75,810	530,660	-27%	-26%				
	8+ nights	43,140	554,490	37,950	441,240			38,530	546,360	2%	24%				

## Exit Survey

Due to the Covid situation that was ongoing throughout 2021, the Exit Survey did not run during that year. However, the tables above contain figures for 2021 based on the data that was collected through the Government of Jersey's travel registration form that arriving passengers were required to complete before travelling to Jersey during this period. Please note that the 2021 data should be viewed in light of the following caveats:

- The methodology relating to the 2021 data as compared to the 2022 data is different, as the 2021 data originates from the self-completed Government travel registration form and the 2022 data (and other years of data) are based on the Exit Survey data. This difference in the methodology must be kept in mind when making comparisons between the 2021 and 2022 data.
- The Exit Survey data includes a grouped category of "Other" in relation to visit purpose, which is included within the total number of visits. The Government travel registration form contained different visit purpose categories and did not have the same definitions that applied to the purpose of visit question in the Exit Survey.
- 'Leisure/Holiday' was added as a visit purpose option to the Government travel registration form in May 2021.
- The Government travel registration form data relates to arriving passengers rather than departing passengers and relied upon self-completion. Closer scrutiny of the data highlighted some data quality issues, possibly due to people misunderstanding the questions or answer options within the form.
- The 2021 data from the Government travel registration form was published on the Government of Jersey's website. Certain adjustments were made by Visit Jersey to proportionately reallocate unstated or 'don't know' responses with calculations based upon the travel registration data grossed up by passenger arrivals data.

In December 2021 4insight took over the contract to administrate the Exit Survey and analyse/report on the data. The fieldwork and analysis processes were piloted during February 2022, going live in March 2022.

As fieldwork had not yet commenced in January 2022, the breakdown of visitor figures for that month are based on estimates (informed by data collected in the same period of previous years). Figures for January have been calculated based on rounded estimates (to two decimal places) and so the breakdown of visitors and visitor nights may not equal the total figures exactly in Table A2.